

1. Task Order Title:

MTMC Systems Response Center (MSRC)

2. Background:

The MTMC Systems Response Center (MSRC) is an inbound and outbound call center servicing multiple transportation applications. The MSRC does not include the MTMC internal help desk. The MSRC focuses on employing Customer Relationship Management (CRM) techniques by gathering accurate customer profile information including names, phone numbers, email, as well as customer organization history, activities, requirements, past problems, and associated documentation. Customers are directed to appropriate Customer Service Representatives (CSR) based on their responses through the Interactive Voice Response (IVR) system and the skill set of the CSR. Computer Telephony Integration (CTI) provides user information to the CSR prior to answering the phone call and provides call statistics such as volume of calls, number of calls in queue, number of hang-ups, etc. References are made to the MSRC Standard Operating Procedures (SOP) document. This is included as Attachment 1. Please note that the Area Managers and the MSRC Knowledge Manager mentioned in the SOP are not within the purview of this TO.

3. Objectives and Scope:

The objective is to acquire specialized Contractor technical support services to support customers of MTMC's Transportation programs and systems. Contractors shall be fully staffed and proficient at the start of the contract ready to meet all objectives and all required call center guidelines. No transition period with the current MSRC personnel will be provided. Included in the scope are the following requirements:

- A.** Provide on-site 24/7 customer assistance to MTMC worldwide customers. The Contractor is encouraged to use flexible work schedules to accommodate the fluctuations in call volumes and ensure sufficient coverage.
- B.** 80% of SRs shall be resolved within the MSRC within two hours of SR submission.
- C.** All Contractor personnel on the MSRC shall be required to complete the Kaplan Call Center Solutions and Selection Advantage Test and could be required to demonstrate knowledge of technical, functional, and/or e-mail writing ability.
- D.** Provide solutions to SRs when available and, when necessary, direct SRs to the appropriate personnel for resolutions.
- E.** Perform outbound calling surveys to gather information from MTMC customers.
- F.** Maintain the MSRC knowledgebase to include review of input for grammar and readability, removal of redundancy, reuse, and accuracy. Follow-up with CSRs on proper procedures for submitting information. The contractor shall review Knowledgebase content for retrieval and ease of use by customers on the MTMC website.
- G.** Maintain information provided to customers through the MTMC website to achieve customer self-service.
- H.** Research and recommend CRM improvements and call center best- practices for the MSRC and the business process areas. Implement CRM and call center best practices into daily MSRC operations.

4. Specific Tasks:

- A. Area Knowledge Management Analyst.** The Contractor shall provide any required assistance in the role of Area Knowledge Manager Analyst (AKMA) in the

following areas: freight, personal property, passenger, ocean cargo, and technical. Depending on the volume of calls for these areas, there could be one individual for each area, several individuals for one or more of the areas, or one individual handling several areas. The AKMA shall work closely with the MSRC Area Managers (AM). The AKMA shall focus on business process improvement recommendations based on information gathered and analyzed from application web logs, MTMC site web logs, Siebel and CTI statistics, and common customer problems. The AKMA contractor shall coordinate issues, problems, resolutions, and specific system support with the AM. The AKMA Contractor shall provide ongoing support to include, but not be limited to the following: generating standard reports including routine system reports; providing on-the-job training to new employees for their particular knowledge area(s); reviewing solutions for technical accuracy, completeness, spelling, grammar, and redundancy; notifying the AM regarding high priority SRs; updating CSRs and AM on status of high priority SRs being worked by the Project Management Office; updating the Siebel ticker to provide information on high priority SRs as needed; updating IVR to provide emergency messages to the customers; researching and resolving complex customer SRs that have been escalated; monitoring system(s) of responsibility; identifying and correcting any specific problems with individual CSRs that could impact customer service; developing additional scripts as needed; and recognizing and recommending items needing improvement within their knowledge area. The contractor shall provide support to the government TO Monitor to include, but not be limited to: report generation, analysis, documentation preparation, information and point papers, briefings, presentations, reviews, demonstrations, customer support, and conducting and attending meetings as required by the TO Monitor. By reviewing data input by the CSRs, the Contractor shall identify and notify the AM regarding any customers tying up the call center resources due to lack of training or failure to use the training materials provided.

B. Customer Service. The Contractor shall provide 24/7 on-site customer service support to MTMC customers allowing them to report problems to the MTMC Alexandria, VA location. The Contractor shall provide service to all MTMC customers that includes, but is not limited to: Answering, evaluating, and prioritizing customer SRs submitted via telephone, voice mail, e-mail, and fax; Interviewing user to collect information about problem to determine source of error; Logging and tracking call information using the Siebel Customer Relationship Management software; Correctly inputting information provided by the customer into the Siebel CRM software and ensuring that data is entered into all applicable fields; Identifying, researching, and resolving routine customer SRs to include testing within the transportation applications and recreating the user problems; when necessary create configuration management problem and change reports working and coordinating closely with the project manager for that application; In resolving customer problems, at times the contractor shall be required to manipulate data within the system using several types of methods, including SQL statements and scripts. The contractor shall gain the knowledge of system database and table relationships in order to accomplish this task. The contractor shall have the knowledge of the system and government agency interfaces and shall be capable of troubleshooting and resolving issues pertaining to these interfaces. The contractor shall use solution software to attempt to resolve SRs; Inputting new solutions into solution software as needed; Following-up on customer inquiries according to procedures detailed in the MSRC SOP. The CSR Contractors shall be responsible for escalating calls to appropriate staff members when they are unable to provide assistance to the customer. The Contractor shall be responsible for following-up on the resolution of tickets and updating the database accordingly. The contractor shall maintain constant contact with the user, providing updates on the status and resolution of the SR. The metrics to measure the level of service provided by the contractors shall include but not be limited to: average talk time, after call work time, caller satisfaction, and same day resolution. Custom service metrics should meet or exceed the following guidelines: 60% first call resolution, email/fax response within three hours, and 80% calls resolved within two

hours. The following should not be exceeded: 90% occupancy rate, 10% forwarded to voicemail, data entry error rate not to exceed 2 errors per 10,000 data fields entered,

C. Outbound Calling. The Contractor shall perform outbound calling to survey customers. The Contractor shall follow specific guidelines for performing the survey and recording the results within the specified survey timeframe. Outbound call volume will be required for all areas of customer surveying. The survey may be conducted to determine overall customer satisfaction, transportation provider rating for each movement provided for the customers, areas for improvement, impact of recent system changes, and the validity of customer feedback. The surveys may be conducted by email, upon exiting an application, and/or through phone calls. The survey may include import of data from MTMC transportation applications. The Contractor shall provide reports detailing the results of the surveys. These reports should identify potential problem areas within the individual MTMC systems, the MTMC business processes, and the customer service provided by the MSRC personnel. The contractor shall provide information obtained from the surveys to the respective office(s) so that potential problems can be rectified. The contractor shall coordinate all customer surveys with the MTMC Distribution Analysis Center (DAC).

D. Customer Relationship Management (CRM) and Call Center Best Practices. The Contractor shall research and remain current on CRM principles and apply these principles to the daily interactions with the customers. The Contractor shall research and keep abreast of call center best practices to recommend and implement these best practices into the MSRC.

E. Customer Self-Service Site. The Contractor shall implement and maintain content provided to customers through the MTMC website. The content material should be sufficient to provide self-service capability to the customers. The contractor shall review the customer's needs and requirements to improve the capabilities of this site. The information provided needs to follow the Security guidelines put forth by DOD and the Army restricting information on a need-to-know basis. The contractor shall review this site weekly, to ensure that information on the website is current, accurate, and user friendly.

F. Problem Resolution and Escalation. The Contractor shall pursue customer SRs to resolution. The Contractor shall escalate requests to appropriate personnel based on guidelines provided in the MSRC SOP. The Contractor shall meet with system representatives to resolve problems, raise issues of concern, and to keep the MSRC database current with changes occurring in the systems. This dialogue is critical to ensure that the customer receives the most accurate and timely information. Any reported system problem shall be immediately forwarded to the AM within the Project Management (PM) office. The AM shall work within the PM to resolve the problem and inform the Contractor when the problem is resolved. The Contractor shall keep the customer informed of the status of the problem either through phone calls or email. Upon resolution of the problem, the Contractor shall update the SRs in the MSRC database.

The contractor shall answer 80% of telephone calls within 2 hours. The other 20% of calls shall follow these guidelines: there are three priority levels for SRs: high, medium, and low. Based on the priority level and the escalation procedures, additional resources could be needed to resolve the problem. High priority SRs require immediate action and should be completed in 24 hours. These are problems that prevent work from being completed or requests from a high-ranking individual. Medium priority problems do not prevent work from being completed but significantly hamper the completion of the work. They should be completed within 3 days. Low priority items do not severely inhibit work being done and should be completed within a week. The complexity of the problem and

special circumstances outside the control of the MSRC could delay the resolution of problems in the desired timeframe.

G. Script Development and Usage. The Contractor shall assist the PM Offices in the development of standard scripts for common user problems. These scripts should be well defined with step-by-step instructions that the customer can receive through email, over the phone, or through the MSRC website. The Contractor shall ensure that these scripts are being provided to the customer and shall make any necessary changes to ensure that the scripts remain accurate. The Contractor shall review the information to ensure that there is no redundancy between the databases. If the solution is already present in other knowledge areas within the Command, i.e., the MTMC web site database, that site should be referenced rather than a copy made of the original information. This ensures that MTMC customers always get the most accurate information and that it is consistent regardless of the source.

H. Coordination with Project Management Offices. The Contractor, specifically the AKMAs, shall work closely with designated personnel from the PM Offices to resolve problems raised by customers. The AKMAs will attend regular meetings with the system offices that fall under their knowledge area. Each individual PM Office will determine the participants and scope of these meetings. This will allow the AKMA to remain informed of current problems, upcoming changes, recurring problems, future plans, and scheduled outages so that customers are provided with the most accurate information. The frequency of these meetings may vary but this information shall be conveyed to the MSRC staff in a timely manner so that accurate information is provided to the customers. The Contractor shall proactively obtain training/expertise from the PMOs for existing and new applications and shall keep abreast of changes made to application.

I. Aptitude Testing. The Contractor shall bring on personnel who score in the medium or higher range on the Kaplan Call Center Solutions and Selection Advantage Test in the areas of investigation skills, problem solving, speed and multi-tasking. Some provisions on the scoring will be allowed for key personnel. Contractors scoring in the low range shall be closely monitored and expected to raise their scores within eight weeks of their starting date at MTMC. The test shall be administered at MTMC Alexandria. Scheduling for the test shall be arranged through the TO Monitor. MTMC reserves the right to refuse prospective personnel with low scores in the required critical areas.

J. Skill/Responsibility Breakdown. The Contractor shall staff the MSRC with personnel possessing the required skills and knowledge to provide customer satisfaction. The Contractor shall keep abreast of functions within current and upcoming MTMC applications and have at minimum 1-year hands-on experience in each of the MTMC skill areas. Specific responsibilities and on-site support requirements are defined below:

- Ocean Cargo systems support including questions regarding the MTMC applications or business processes for the movement of freight over water.
- Freight systems support regarding the MTMC applications or business processes for the movement of freight over land.
- MTMC financial systems support to include knowledge of MTMC's implementation of Oracle Financial software
- Passenger movement systems support
- Personal Property systems support including questions regarding the MTMC applications or business processes for the movement of DOD personal property shipments.

- General MTMC systems support not to include internal MTMC desktop applications
- Technical support including but not limited to:
 - hardware (printer/copier/fax, modem, network hardware, peripherals, SCSI terminal server, tape drive, etc.)
 - software (Microsoft Office automation, Operating systems to include HP and Sun UNIX, Windows; Oracle SQL, Oracle Financials, Oracle Discoverer)
 - connectivity – working with Defense Information System Agency (DISA) when customers are experiencing problems with the Unclassified but Sensitive IP Router Network (NIPRNet)
- Days/Hours of Support Required
7 days a week//24 hours a day

K. Report Generation. The Contractors working in the AKMA role shall generate regular reports from the data contained in the MSRC database using the Siebel Reporting Tool, Oracle Discoverer, Oracle SQL, and Microsoft Excel and Word to support requirements from the PM shops. The reports should identify any systemic problems that need to be brought to the attention of the TO Monitor. The Contractor shall design and distribute reports to include but not be limited to CTI, IVR, application web logs, MTMC web site logs, and specific PM reports. The programs created to generate these reports shall be documented and provided to the TO Monitor. Any changes made to the programs shall be provided to the TO Monitor. Report requirements are subject to change based on user requirements.

L. Transportation Operational Personal Property Standard System (TOPS) System Training Support. The Contractor shall provide appropriate Systems Administrator (SA) training and shall coordinate, support, and provide information with all TOPS system required agendas and administrative requirements pertaining to SA software training sessions. The Contractor shall provide a short and long term SA Training Plan based on program and system objectives for each known TOPS deployment schedule/upgrade and/or software fix. The SA Plan shall include dates and locations for proposed training sessions. Once the plan is approved the contractor shall support the TOPS program manager with all activities leading up to TA training. The Contractor shall reserve the training location, send out notification to the Service representatives and ensure hotel accommodations are made for class attendees. The Contractor shall ensure that all equipment is loaded and working correctly with required software, send out information packets to personnel attending training and coordinate with the MTMC security office when necessary. The contractor shall update, as needed, documented system training in the existing plans and manuals. The contractor shall ensure documentation and schedules remain accurate for all system requirements and user training being conducted.

M. Customer Surveys. The Contractor shall be involved in the customer survey process. This may include but not be limited to the preparation, delivery, and analysis of recurring surveys.

N. CSR Management. The Contractors working in the AKMA role shall monitor the service provided by the CSRs. This shall include, but not be limited to, reviewing phone calls along with the CSR, reviewing survey responses provided by the customer, comparing the information entered by the CSR with the request submitted by the customer, providing training to the CSR to focus on particular problem areas, working directly with the customer if a CSR has not provided the appropriate level of service, and identifying any serious problems with customer service to the TO Monitor.

O. Personnel Turnover. The Contractor shall provide the TO Monitor with the opportunity to review all new candidates when there is turnover on the MSRC. The TO Monitor shall be given the opportunity of reviewing the resumes as well as attending the interviews and approving the new personnel.

P. Training Manual. The Contractor shall develop and maintain a manual that documents procedures and solutions for resolving “simple” SRs for particular skill areas as defined in section 4J. A simple SR is defined as one that can be solved while the caller is on the phone or within a reasonable amount of time. This information should also be available to the CSRs through the standard solutions contained in the Siebel knowledgebase. The training manual shall be sufficiently comprehensive so that a majority of “simple” SRs can be answered by any of the CSRs. This manual shall be a living document that is updated as system and business process changes are made. A copy of the manual shall be provided to all CSRs and AKMAs working in the MSRC.

Q. Contingency Situations. The Contractor shall be prepared to provide additional resources in the event of a surge in call volumes due to an emergency situation. In the case of a catastrophic event that impacts the operational capability of the MTMC facility in Alexandria, the Contractor shall be prepared to relocate individuals to provide support in an alternative center. The additional cost and terms of a contingency situation or relocation shall be agreed upon by the Contractor and the TO Monitor/CO upon activation of a contingency plan and should not be included as a cost in this contract.

R. Testing. The Contractor shall take part in MSRC software testing as requested by the TO Monitor. This may include, but not be limited to, testing changes on the Siebel client software, Siebel web testing, IVR usability testing, and CTI testing.

S. Security Compliance. The Contractor shall review MSRC public information, IVR messages, and CSR/customer discussions based on security guidelines put forth from the Army and DOD.

T. Monitoring Tools. The Contractor shall check for any problems with the network or specific systems that occur outside of normal business hours by using the Command monitoring tools (CA Unicenter, Freshwater Sitescope). The Contractor shall report any problems based on guidelines provided in the MSRC SOP or specifically provided by the systems.

U. Status Reporting.

The Contractor shall generate the following documentation as required:

Testing – results of any testing performed by the Contractor
when changes are made to the desktop application or
MSRC components

Training – status of the training received by the Contractor

Meetings – notes from meetings held between the Contractor
Project Manager/AKMAs and the MSRC Management or TO Monitor,
as required

Leave – status of leave of Contractor Personnel

Holiday – support is required during government holidays

Weekly Status Report – update of duties performed during the
week by the Contractor Personnel

Briefing Charts, Point Papers, Executive Summaries, and
Information Papers – provided in MTMC specified format,
as required

5. Place of Performance:

A. Facilities, Supplies, and Services. Contractor work shall be performed on site at MTMC Hoffman Building in Alexandria VA. Desk spaces shall be provided for required individuals. Shift workers shall share desks. Additional resources shall include the use of a computer workstation, telephone, FAX, photocopier, MTMC standard office automation software (word processor, spreadsheet, graphics, and project management), e-mail, and required network access. Expendable office supplies shall also be provided.

B. Travel. There is no travel required.

6. Period of Performance. Period of Performance is as follows:

Base Period – 1 Nov 2003 – 31 Oct 2004

1st Option Period – 1 Nov 2004 – 31 Oct 2005

7. Contract Type. Firm Fixed Price

The Statement of Work remains the same through the Option Years.

8. Deliverable/Delivery Schedule.

The following are expected deliverables or deliverables that may be determined as required by the MSRC TO Monitor throughout the life of this SOW:

Deliverable Title	Description	Delivery Due
Applicant Screening	Each individual brought on to the MSRC shall be required to complete the Kaplan Test if required by the TO. Each individual must go through proper security screening that will allow them access into the Hoffman building and to the network computers	Before individual begins work
Provide customer service support to accommodate customer needs	Scheduling must support the call volume schedule present and in future and skill breakdown required by the customers.	Contractor shall provide a weekly schedule to the COR on each Monday. Not to exceed 1000 inbound calls/emails/faxes daily.
Call Center Management Reports	Monthly report providing phone volumes, abandon rate, queue, voice mail, etc. Regular review of data to ensure that staffing is adequate to the skills required by the customers	Monthly
Perform outbound call surveys	Call customers from a current list following specific guidelines. Collect data from customers and input in required form	As required not to exceed 1000 outbound calls daily.
Problem Resolutions Scripting	Step by step instructions to resolve problems. Scripts shall include close coordination with project representatives	As required not to exceed 500 scripts per month
Maintenance of MSRC knowledgebase	Review of input for grammar and readability, removal of redundancy, reuse, and accuracy. Follow-up with CSRs on proper procedures for submitting information. Knowledgebase information shall be reviewed for ease of use by customers	Daily review required.
PM Reports	Specific reports based on requirements from the PM	Daily/Weekly/Monthly/Quarterly
CRM and Call Center Best Practices	Research of current CRM and best practices	Monthly meetings providing research info and recommendations
Training Manual	Documentation for majority of "simple" SRs in MTMC's Ocean Cargo Program (excluding WPS)	Updated training manual based on MSRC standards due 90 days after TOM provides training manual template.
TOPS SA Training Manual	Standard Distribution	Initial – 30 days prior to training Final – 15 days prior to training Updates – prior to each training session, as required by software changes Training Manual – updated

		as required for each session
TOPS Training		Provide training to TOPS users. Not to exceed 5 monthly classes

Standard Distribution

E-mail 1 copy of deliverable to the TO Monitor using MTMC Standard Office Automation; any required formats shall be specified by TO Monitor.

9. **Security Compliance:**

- A. Clearances. The Contractor shall assure personnel assigned to work classified issues or classified interfaces possess a SECRET security clearance. Upon request, the Contractor shall provide verification of clearance for each individual to MTMC's Information Security Office and the MSRC TOM. A DD254 for the Contractor is contained in the contract file. The Contractor shall be able to obtain a DoD Building Pass (Badge) through the National Crime Information Center (NCIC) process.
- B. Classified Work - Secret. The Contractor shall comply with security regulations while handling classified material, reports, and other products. The Contractor shall perform all work involving classified data at designated MTMC facilities.
- C. Network Security. The Contractor shall ensure that all Government hardware and software are in compliance with MTMC security guidelines and only authorized personnel have access to the network. A copy of the MTMC security guidelines shall be provided upon award.
- D. The Contractor shall ensure that roles/privileges assigned to Contractor employees on the Government testing and production platforms are limited to the roles/privileges essential to that individual's performance of his/her assignments. These roles/privileges can be limited or revoked by the Government.

10. **Government Furnished Equipment (GFE)/Government Furnished Information (GFI):**

GFE serial numbers shall be provided at time of award. All available GFI functional and technical documentation required shall be provided to the Contractor.

11. **Other Pertinent Information or Special Considerations:**

- A. **Identification of Possible Follow-on Work.** N/A
- B. **Identification of Potential Conflicts of Interest (COI).** N/A
- C. **Identification of Non-Disclosure Requirements.** N/A
- D. **Packaging, Packing and Shipping Instructions.** The Contractor shall provide all deliverables and other project related products, reports, etc., as an electronic file e-mail attachment whenever possible. The Contractor shall generate all document deliverables using standard MTMC office automation software products. If the Contractor determines that it would be more beneficial to use non-standard MTMC office automation software to generate any of the required deliverables, the Contractor must notify and receive approval from the TO Monitor prior to generation of those deliverables. In the event that deliverables cannot be delivered via e-mail they shall be hand-delivered on Floppy Disk or CD. All software, documentation, training literature, and any other deliverables described in this TO shall be wholly owned by the

Government (MTMC).

E. Inspection and Acceptance Criteria. MTMC shall require up to ten (10) working days from receipt of all deliverables for review and comment/acceptance. At the end of the 10 days, MTMC shall be prepared to proceed or provide guidance to work towards an acceptable revision. Acceptance shall be based upon the deliverables meeting accepted professional standards for technical content, workmanship, and relevance to stated functional business process requirements. If no guidance is received from MTMC by the end of the 10 day period, the Contractor shall assume acceptance. Any guidance from MTMC for improvement/revisions to deliverables shall be provided in writing.

F. Personnel Expertise. Contractor shall ensure that the required level of expertise is applied to this effort. Expertise shall consist of all technical skills identified in the Evaluation Criteria Section 12 under Relevant Experience Factors (Factor 1). All resumes for prospective MSRC personnel must be submitted with the proposals to the TO Monitor. The TO Monitor reserves the right to meet with prospective new Contractor personnel. Assignment of new Contractor personnel shall be subject to TO Monitor approval. At no additional expense to the Government, the Contractor shall ensure that personnel assigned to this project remain current in the technical skills required to support and execute this TO. Contractor shall provide with proposal submission, a detailed list of experience with MTMC transportation applications and functions for the transportation skill areas listed in 4J. Included in this list should be specific experience and time spent on each of the functions within the applications.

G. Key Personnel. Key Contractor personnel for this TO are considered to be individuals possessing the required skills needed and must have a minimum of 1 year specialized experience providing support in each of the DOD transportation skill areas, listed in 4J, and must perform the tasks listed above and the responsibilities defined in further detail in the MSRC SOP. MSRC individuals shall have at a minimum 1 year experience using Siebel Call Center software.

Job categories shall be limited to:

- Project Manager
- CSR with Computer System Analyst training
- CSR with Military Transportation Specialist training
- CSR with Quality Assurance training
- Helpdesk Manager
- Software Training Specialist

The Contractor shall not deviate from these specified areas of expertise.

H. Work Hours. The Contractor shall provide 24 x 7 on-site customer support for the MSRC.

13. Terms

Assist

When used within this document, assist means: To contribute effort in the complete accomplishment of the ultimate purpose intended to be effected by those engaged in this project, but in no way to contribute more than 50 % of the effort.